



## **Data Compliance, Gateway SDF & Gateway Public Access Site**

**Data Analysis Division  
January 2015**



# Agenda

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- Data Compliance Overview
  - Review Process
  - Compliance Reports (rejections, warnings, etc.)
- AV Allocations
  - Review Process
  - Data Checks
- Gateway SDF
  - Overview
  - Search Function
- Gateway Public Access Site



# **Review Process and Compliance Reports**



# Review Process - Real & Personal Property

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- Data reviews occur in a two-step process:
  - Fall:
  - Review data for initial compliance.
    - Data can be deemed “Pending” or “Not Compliant”
      - Pending
        - Best status given in the fall review.
        - Submissions will remain in a pending status until the spring review.
      - Not Compliant
        - A submission that is not compliant must be corrected and resubmitted.



# Review Process - Real & Personal Property

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- Data reviews occur in a two-step process:
  - Spring:
  - Review data in relation to the TAXDATA file and Abstract received from the county auditor.
    - Data can be deemed “Compliant” or “Not Compliant”
      - Compliant
        - No further action is needed.
      - Not Compliant
        - A submission that is not compliant must be corrected and resubmitted.



# Real & Personal Property - Reports

County Property Tax Data Submission to Legislative Services Agency and Dept of Local Govt Finance

Page 1

## Summary of Findings

County:  
File: **Personal Property**  
Year: **2012 Pay 2013**  
Vendor:  
File Create Date:  
File Received:  
Report Date: **12/11/2012**

Status:

**REJECTIONS:** Identified items that must be corrected with a new submission in order for data set to be compliant

1  
2  
3

**WARNINGS:** Identified items that should be reviewed and must be corrected for the 2013 Pay 2014 personal property data submission

1  
2  
3

**NOTES:** Additional comments regarding submission

1  
2



# Review Process – Sales Disclosure Data

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- Review process can be a two-step process:
  - Spring:
    - Data can be deemed “Pending,” “Compliant,” or “Not Compliant”
      - Pending
        - Sales will stay in a “Pending” status until real property is compliant.
        - Real property is currently “Not Compliant” from the fall review.
        - Sales will be re-reviewed with the “Compliant” real property data and be given a final status of “Compliant” or “Not Compliant.”
      - Not Compliant
        - A submission that is not compliant must be corrected and resubmitted.
      - Compliant
        - No further action is needed.



# Data Compliance - All Reports

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- Rejection Items
  - Warrant a not compliant status.
    - Discrepancies that are sufficient to warrant a rejection of the data file for the year submitted.
  - Problem must be identified and process corrected.
  - Corrected data file(s) must be submitted.
- **Warning Items (Sales: “Corrections required for future submissions”)**
  - Discrepancies not sufficient to warrant a rejection of the data file for the year submitted.
  - May result in rejection next year if problem remains.
- Notes
  - Additional comments regarding the submission.





# Compliance Reports - Helpful Tips

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- Tips for getting the most from data compliance reports.
  - What needs to be corrected? What should I do?
    - Read through all rejections and warnings.
      - Correct all rejection items for that year.
      - Review and correct all warning items for the next year.
  - Work through the Excel Workbook in conjunction with the report.
    - An Excel Workbook with the records in question is sent along with the report.
    - Each tab of the workbook corresponds to a rejection and/or warning on the compliance report.



# Compliance Reports - Helpful Tips

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- Tips for getting the most from data compliance reports.
  - Review the Overall Data Summaries
    - Real/Personal
      - Is the Gross AV correct? Number of records seem reasonable? Any potential issues you might see for the spring review with the county abstract and auditor's TAXDATA file?
    - Sales
      - Valid for trending look OK. Number of records seem reasonable?
  - Review any supporting documentation



# **Property Class Codes & Assessed Value Allocations**



# Compliance Checks - Allocations

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- For the fall review, the Department compares the property class code of each parcel to the parcel's AV bucket allocation within the PARCEL file.
- For the spring review, using the property class code from the assessor's PARCEL file, the Department compares the property class code of each parcel to the parcel's AV bucket allocation in the TAXDATA file.



# Compliance Checks - Allocations

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- Based on the property class code assigned to a particular parcel, the Department would expect AV to be allocated to certain AV buckets.
  - For example, we would expect commercial apartments (property class code 401 – 403) to contain AV in the Commercial Apartment Subject to 2% fields.
- Likewise, there are certain AV buckets the Department would expect to be empty for certain property classes.
  - For example, we would not expect to see AV in the Long Term Care Subject to 2% fields for records that carry an industrial property class code (300-399).



# Compliance Checks - Allocations

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- All discrepancies will be noted on the compliance report. A significant number of discrepancies will result in a rejection of the data.
- Changes made to the AV bucket allocations must be resolved immediately via Correction of Error or Assessment Adjustment.
- All changes need to be noted/explained on the spreadsheet and returned to the Department.
- Completed spreadsheets should be sent to [data@dlgf.in.gov](mailto:data@dlgf.in.gov).
  - For example, if a change is made to a property class code, the notes in the spreadsheet should contain the updated property class code.



# Property Class Types

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## Property Class Codes:

- 100 – 199: Agricultural
- 200: Mineral
- 300 – 399: Industrial
- 400 – 499: Commercial
- 500 – 599: Residential
- 600 – 669: Exempt – Government Owned
- 670 – 699: Exempt – Non Government Owned
- 800 – 875: Locally/State Assessed Property



# Gateway SDF





# Gateway SDF - Homepage

INDIANA  
**Gateway**  
for government units

**Sales Disclosure Form**  
An *Information for Indiana* Data Site



## Welcome to the Sales Disclosure Application



### New Users

Get started by creating a Gateway SDF account.



### Returning Users

Already have an account? Login.

### Gateway SDF User Guide



Learn how to get started and navigate through Gateway SDF.

### FAQ



Frequently asked questions regarding the sales disclosure form.

### Search Database



Search the state's sales disclosure database.

### Find How to File



Counties in Indiana choose the method of filing

County:

### Gateway SDF Video Tutorial



Learn how to enter a sales disclosure form in Gateway SDF.

### Find PDF



Search by SDF ID to view a PDF copy of a sale disclosure form.

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to the [Indiana Department of Local Government Finance](#) and the [State Board of Accounts](#). It is maintained by the [Indiana Business Research Center](#) as part of the Information for Indiana Initiative.

#### Email

- [DLGF](mailto:GatewaySDF@dlgf.in.gov)  
(GatewaySDF@dlgf.in.gov)

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# Gateway SDF



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- What is Gateway SDF?
  - Online portal for sales disclosure records
    - Single Form Entry
      - Counties that use the state-provided sales disclosure system.
      - Allows users to complete a SDF online and prepare a PDF copy that can be printed and signed.
      - Upload Application
      - Counties that use a third party vendor for their sales disclosure processing.
    - Public Search and FAQ
      - Public search application for post July 2008 sales disclosure records.




# Gateway SDF - Homepage

New and returning users can log into Gateway SDF by clicking one of the links.




## Welcome to the Sales Disclosure Application



### New Users


Get started by creating a Gateway SDF account.



### Returning Users


Already have an account? Login.

#### Gateway SDF User Guide




Learn how to get started and navigate through Gateway SDF.

#### FAQ




Frequently asked questions regarding the sales disclosure form.

#### Search Database




Search the state's sales disclosure database.

#### Find How to File




Counties in Indiana choose the method of filing  
County:

#### Gateway SDF Video Tutorial



Learn how to enter a sales disclosure form in Gateway SDF.

#### Find PDF



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# Gateway SDF – File Upload

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- Counties that use a vendor system for their sales disclosure processing will upload their sales data via the Gateway SDF File Upload.
- New records as well as records that have been updated/changed, need to be included in the file uploads.
- The file upload will replace the old record with the most current record.



# Gateway SDF – Frequency of Submission


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- Data is to be entered into Gateway SDF in an on-going process throughout the year.
  - Single Form Entry
    - If using Gateway SDF for sales processing, data should be entered throughout the year as SDFs are received.
  - File Upload
    - If using a third-party vendor for sales disclosure tracking, the county should be submitting updated sales files via Gateway SDF on a weekly basis.
    - These files then become publicly accessible via the Gateway SDF Search Application.




# Gateway SDF – Resources

A user may also access the Gateway SDF User Guide and Instruction Video Tutorial by clicking the appropriate links found on the main page.




## Sales Disclosure Form

An *Information for Indiana* Data Site




### Welcome to the Sales Disclosure Application




#### New Users

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Frequently asked questions regarding the sales disclosure form.



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County:



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# Gateway SDF – Resources


User can find out how counties would like an SDF filed by using the “Find How to File” link on the main page.

The user would select the county for which the SDF is to be filed and the system will let them know if that county uses Gateway SDF or requires a paper submission.




**Sales Disclosure Form**  
An *Information for Indiana* Data Site

## Welcome to the Sales Disclosure Application




### New Users

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### Returning Users

Already have an account? Login.




### Gateway SDF User Guide

Learn how to get started and navigate through Gateway SDF.




### FAQ

Frequently asked questions regarding the sales disclosure form.




### Search Database

Search the state's sales disclosure database.




### Find How to File

Counties in Indiana choose the method of filing  
County:



### Gateway SDF Video Tutorial

Learn how to enter a sales disclosure form in Gateway SDF.




### Find PDF

Search by SDF ID to view a PDF copy of a sale disclosure form.

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# Gateway SDF Search Function






# Gateway SDF - Search Function



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The search function in Gateway SDF can be accessed by clicking the link found on the main page of the SDF website.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



[Did you know your local budget notices are available online this year?](#)

## SDF Online Search

SDF ID:	<input type="text"/>
Year:	<input type="text" value="2014"/>
County:	<input type="text" value="Adams"/>
Parcel #:	<input type="text"/>
Buyer's Name (first, last, company):	<input type="text"/>
Seller's Name (first, last, company):	<input type="text"/>
Preparer's Name (first, last, company):	<input type="text"/>
Parcel Address:	<input type="text"/>
Zip Code:	<input type="text"/>
Tax District:	<input type="text"/>
Sales Price (Min, Max):	<input type="text"/>
Conveyance Date (Min, Max):	<input type="text"/>
Sale Date (Min, Max):	<input type="text"/>
Date Received (Min, Max):	<input type="text"/>
Transfer Date (Min, Max):	<input type="text"/>
Valid for Trending:	<input type="text" value="All"/>
Property Class (Choose Range):	<input type="text" value="All"/>

The SDF online search page allows you to search for properties by using a variety of different criteria.

We will visit these one by one but you may use different combinations to find the information you need.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



[Did you know your local budget notices are available online this year?](#)

## SDF Online Search

SDF ID:

Year:

County:

Parcel #:

Buyer's Name (first, last, company):

Seller's Name (first, last, company):

Preparer's Name (first, last, company):

Parcel Address:

Zip Code:

Tax District:

Sales Price (Min, Max):

Conveyance Date (Min, Max):

Sale Date (Min, Max):

Date Received (Min, Max):

Transfer Date (Min, Max):

Valid for Trending:

Property Class (Choose Range):

Search

Clear Fields

Export to Excel

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2014 ▼

Adams ▼

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\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_-

All ▼

All ▼

The easiest way to search the database, if you have the SDF ID number available, is by using the SDF ID option.

To search using this option you would simply enter the SDF ID number, select the year number, select the appropriate county, and click on the Search button.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



[Did you know your local budget notices are available online this year?](#)

## SDF Online Search

SDF ID:

Year:

2014



County:

Adams

Parcel #:

Buyer's Name (first, last, company):

Seller's Name (first, last, company):

Preparer's Name (first, last, company):

Parcel Address:

Zip Code:

Tax District:

Sales Price (Min, Max):

Conveyance Date (Min, Max):

Sale Date (Min, Max):

Date Received (Min, Max):

Transfer Date (Min, Max):

Valid for Trending:

All

Property Class (Choose Range):

All

For any additional search options you will need to enter the year and county name. You may search by year ranging from 2008 thru 2015.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



[Did you know your local budget notices are available online this year?](#)

## SDF Online Search

SDF ID:

Year:

County:

Parcel #:



Buyer's Name (first, last, company):

Seller's Name (first, last, company):

Preparer's Name (first, last, company):

Parcel Address:

Zip Code:

Tax District:

Sales Price (Min, Max):

Conveyance Date (Min, Max):

Sale Date (Min, Max):

Date Received (Min, Max):

Transfer Date (Min, Max):

Valid for Trending:

Property Class (Choose Range):

If you have the parcel number available, you may also search using that information.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



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SDF ID:	<input type="text"/>
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Seller's Name (first, last, company):	<input type="text"/>
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Date Received (Min, Max):	<input type="text"/>
Transfer Date (Min, Max):	<input type="text"/>
Valid for Trending:	<input type="text" value="All"/>
Property Class (Choose Range):	<input type="text" value="All"/>
<input type="button" value="Search"/> <input type="button" value="Clear Fields"/> <input type="button" value="Export to Excel"/>	

Another easy way to search is by using the names of the buyer, seller, or even the preparer.

For example, you may search for all sales within Adams County for buyers with the last name of Smith.



# Gateway SDF - Search Function

[Login](#) | [Main](#) | [FAQ](#) | [Password Recovery](#) | [Create User](#) | [Search](#) | [Lookup](#)



[Did you know your local budget notices are available online this year?](#)


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Sales Price (Min, Max):	<input type="text"/>
Conveyance Date (Min, Max):	<input type="text"/>
Sale Date (Min, Max):	<input type="text"/>
Date Received (Min, Max):	<input type="text"/>
Transfer Date (Min, Max):	<input type="text"/>
Valid for Trending:	<input type="text" value="All"/>
Property Class (Choose Range):	<input type="text" value="All"/>

Other search options include searching by Tax District, Sales Price, Conveyance Date, Sale Date, Date Received, and Transfer Date within a selected county.




# Gateway SDF - Search Function



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Frequently asked questions regarding the sales disclosure form.

#### Search Database



Search the state's sales disclosure database.

#### Find How to File



Counties in Indiana choose the method of filing  
County:

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Another option for the search function is to use the “Find PDF” link on the main page.

Please note: If using this method to view an SDF that was already filed you must have the SDF ID number available.





# Gateway Public Access Site



# Gateway – Overview

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- Gateway collects and provides free access to information about how taxes and other public dollars are budgeted and spent by Indiana's local units of government.
- Local units of government submit data to certain state agencies online.
  - Specifically, local officials submit budget forms and debt reports to the Department via Gateway. Annual financial reports and employee compensation reports to the State Board of Accounts are submitted via Gateway.
- Submitted information is immediately available for review by state agencies and is accessible online by the public shortly thereafter.
  - We will focus on the Gateway Public Access Site.



# Gateway Public Access Site - Main

<https://gateway.ifionline.org/>

## INDIANA Gateway for government units



[Home](#)

[Report Builder](#)

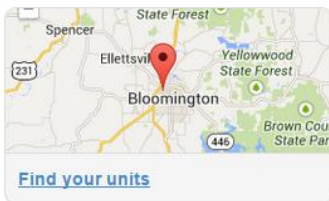
[Download Data](#)

[Learn More](#)

[Local Officials: Login Here »](#)

### An Open Door into Local Government Finance

*Gateway collects and provides access to information about how taxes and other public dollars are budgeted and spent by Indiana's local units of government.*



[Find your units](#)



[Public employee compensation](#)



[When is your budget hearing?](#)



[Access local expenditures](#)



[Learn more about debt](#)



[View local budgets](#)



# Gateway Public Access Site - Main

## INDIANA Gateway for government units

[Home](#)

[Report Builder](#)

[Download Data](#)

[Learn More](#)

[Local Office](#)

### An Open Door into Local Government Finance

*Gateway collects and provides access to information about how taxes and other public dollars are budgeted and spent by Indiana's local units of government.*

- There are two main sections in the Gateway Public Site
  - Report Builder
  - Data Download



# Gateway Public Access Site - Report Builder

Select by Report Type [View data release calendar >](#)

Green = submitted to the Department of Local Government Finance (DLGF)  
Blue = submitted to the Indiana Education Employment Relations Board (IEERB)

Red = submitted to the State Board of Accounts (SBOA)



## [Annual Financial Report](#)

Multiple reports detail the receipts and expenditures of each local government unit, reflecting income and expenditures for a full calendar year. The primary purpose is to assist in the auditing of government units.



## [Assessed Value](#)

The Certified Net Assessed Value (CNAV) data provides information on the tax base.



## [Budgets](#)

Every local government unit with authority to levy a property tax must submit a budget for the coming calendar year to DLGF, which has the responsibility to review and certify budgets and set tax levies and tax rates.



## [Collective Bargaining](#)

Each public school corporation is required to report on their collective bargaining with the Indiana Education Employment Relations Board. Gateway is now being used to collect and publish those data.



## [Debt Management](#)

These reports help the public know how much local government debt has been issued, the cost of interest to support the borrowing, the purpose of the borrowing, the source of repayment, and the total outstanding balances.



## [Economic Development Reporting](#)

The economic development payments subject to reporting are monetary disbursements initially provided by a licensed owner of a riverboat, an operating agent of a riverboat, or an affiliate of an owner or operating agent.



## [Employee Compensation by Unit](#)

The Certified Report of Names, Addresses, Duties and Compensation of Public Employees (Form 100R) provides taxpayers with compensation information for public employees of state and local government.



## [Property Tax](#)

Property taxes are a primary source of funding for local governments. These summary reports provide an overview of the property taxes paid and distributed.



## [Redevelopment Commissions](#)

Redevelopment Commissions are required to submit a report (not standardized at this time) for review to DLGF. These reports are submitted in PDF and available via the Gateway in the form in which they were submitted.



## [Solid Waste Management Districts](#)

Solid waste management districts are required to submit financial and programmatic data.

- The Report Builder section has several reports available related to taxing, budgeting, and spending of local governments.
- By clicking on the icon or on the link of the report, you will be directed to another screen which will allow you to specify and narrow your report criteria.
- We are going to click on the “Assessed Value” report.



# Gateway Public Access Site - Report Example “Assessed Value”

## INDIANA Gateway for government units



[Home](#)

[Report Builder](#)

[Download Data](#)

[Learn More](#)

[Report Builder](#) » [Select Report](#)



### Assessed Value

The Certified Net Assessed Value (CNAV) data provides information on the tax base.

[Learn more about these data »](#)

#### Select a Report

- [Certification of Net Assessed Values by District](#)  
Determines the property tax base for each government unit
- [Selected County CNAV Submitted Values by District](#)  
Shows the change in adjusted net assessed value from the prior year
- [CNAV Submission Log](#)  
Find out which units have submitted their assessed value data

- Most report types will have more than one report available
  - **By clicking on the report, you will be directed to a screen where you can narrow your criteria and select specific units, etc.**



# Gateway Public Access Site – Download Data

## INDIANA Gateway for government units

[Home](#)[Report Builder](#)[Download Data](#)[Learn More](#)

### Download Data

While the Report Builder can provide users with information on selected units or types of units, some users will want larger quantities of data without going through the report building process. We provide multiple pipe-delimited CSV or text files that can be easily read by spreadsheet, database or statistical analysis tools and contain data for all units.

#### Important Notes

Because the data are financial, we wanted to ensure there would be no software translation issues with these files, so the files are pipe (|) delimited files (a pipe is the stroke generally found above the enter key on your keyboard). You will need to indicate that the delimiter is the pipe when you are importing these files into your software of choice. For example, with Excel, you can quickly transform the data using the Text-to-Columns feature.

#### Click a Heading to View Available Downloads

[Annual Financial Reports](#)[Assessed Value](#)[Budget Data](#)

#### 2013-2014 Budget Data

[Download this documentation](#) in order to interpret the column headers.

- [Budget Estimate - Financial Statement - Tax Rate \(Form 4B\)](#)
- [Budget Summary \(Form 4A\)](#)
- [Line-Item Budget Estimate \(Form 1\)](#)
- [Estimate of Miscellaneous Revenue \(Form 2\)](#)

- The Download Data section provides users with large quantities of data without going through the report building process.
- Annual Financial Reports, Assessed Value, and Budget Data are available for download.





# Contact the Department

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